TAP FAQ's

Contact Us

The following tax accounts are available through Taxpayer Access Point:

Agency Liquor Store (LIQ)	Domestic Brewery License (DBR)	Misc Mines Net Proceeds (MMN)
Bad Debts (BDT)	Domestic Winery License (DWR)	Nursing Facility Utilization Fee (NFB)
Beer Tax (BET)	Electrical Energy Tax (EEL)	On-Premises License (ONP)
Bentonite (BEN)	Fiduciary-Estates and Trusts (FID)	Other Tobacco Products (OTP)
Brewery Storage Depot (BSD)	Foreign Brewery Import License (FBI)	Partnership (PTR)
Cement and Gypsum (CGT)	Foreign Winery Import License (FWI)	Public Service Regulation Fee (PSR)
Cigarette Tax (CIG)	Hard Cider (HCT)	Rental Vehicle Tax (RVT)
Coal Gross Proceeds (CGP)	Hospital Facility Utilization Fee (HUF)	Resource Indemnity Tax (RIT)
Coal Severance Tax (CST)	Individual Income Tax (IIT)	Retail Telecommunications Excise Tax (RTE)
Connoisseur License (CON)	Liquor Resort (RES)	Small Business Corp (SBC)
Consumer Counsel Fee (CCT)	Lodging Facility Sales & Use (LFT, LST)	Telephone Device for the Deaf (TDD)
Corporate License Tax (CLT)	Metal Mines Gross Proceeds (MMG)	Vendor Representative License (VRL)
Distilled Spirits Mfr License (DSM)	Metal Mines License Tax (MML)	911 Emergency Telephone Fee (911)

Getting Started/Login/Access

1. How do a sign up for account access? Back to Top
    a. Select the Sign up Now button
    b. Complete each of the steps indicated by clicking on the blue links next to the step #'s
        i. Select account type (or if you are a professional tax preparer, enter your SSN or FEIN)
        ii. Provide specific information about your account, so we can verify that it is your account
            1. Individual Income Tax provide
                a. Social Security Number
                b. Last name that appeared on your most recently filed state return
                c. Federal adjusted gross income from your most recent Montana Income Tax return (must have been filed within the last 4 years)
            2. Withholding Tax
                a. Account ID
                b. Zip Code
                c. Last payment amount OR total wages paid from your most recently filed MW-3 OR FEIN
            3. All other tax types
                a. Account ID
                b. Zip Code
        iii. Provide your profile information
            1. Name
            2. Phone Number
            3. Email Address
            4. Login ID
            5. Password
            6. Secret Question and Answer (in case you forget your password)
        iv. Submit access request
        v. Within 5-10 minutes, you will receive an email or text with your authorization code and you may now login to your account.

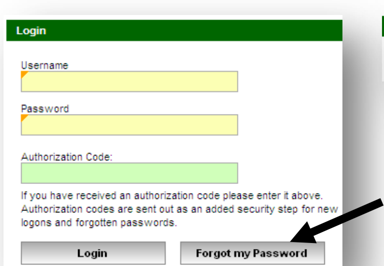
2. What should I do if I didn't receive my authorization code? Back to Top
    a. It may take 5-10 minutes to receive your authorization code.
    b. Check your junk or spam folder. Your filter may be set too high to receive these messages.
    c. **Contact Us** and we will unlock your account. Once you get into your account, verify the email address was typed correctly.

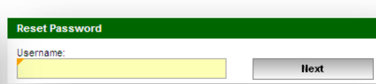
3. I forgot my password. How can I choose a new one? Back to Top

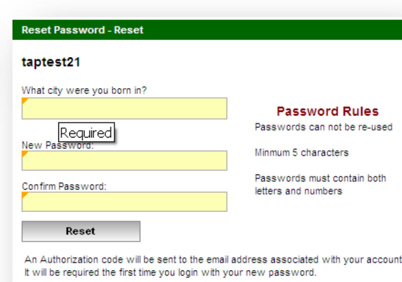
1. At login screen select "Forgot my Password"

2. Enter Username

3. Answer secret question and enter new password.







4. An authorization code will be sent to the email address associated with your account. It will be required the first time you login with your new password.

4. Can I access my multiple tax accounts under one login?

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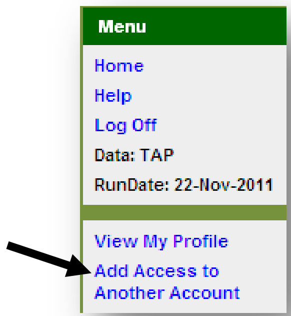
   a. Yes. You will need to create your initial login to one account and then choose "Add Access to Another Account" on the left side of the screen. You will need to use this for each additional account that you wish to access under this login.



5. How can I give or cancel my tax preparer's access?

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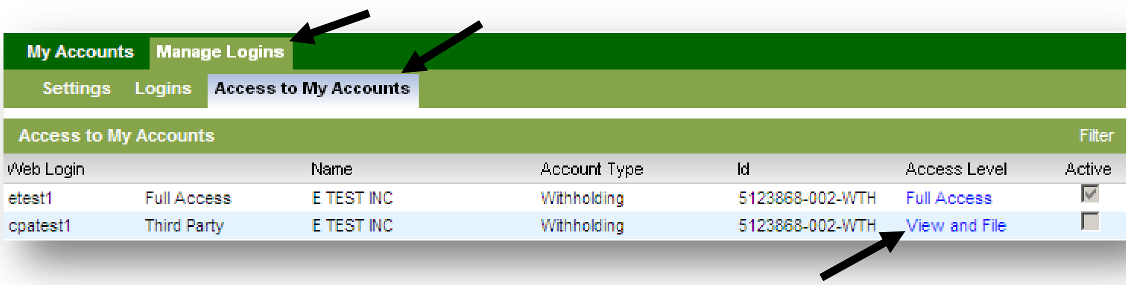
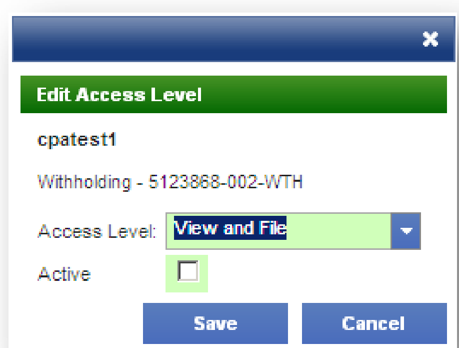
To view, approve, cancel or edit a tax preparer's access to your account

   a. Login to your TAP account.
   b. Go into "View My Profile" on the left side of the screen.
   c. Choose the "Manage Logins" tab and then the "Access to My Accounts" tab.



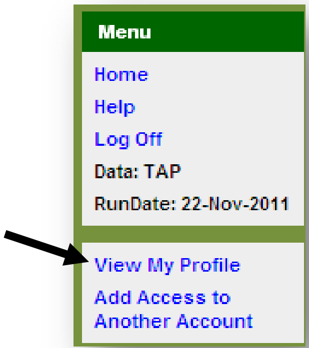
   d. To modify a user's access, select the Access Level link.

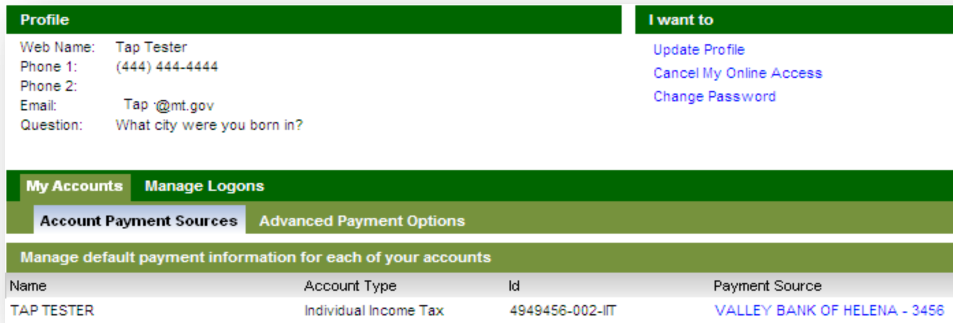
   e. Select the Access Level you wish to grant them.
      i. Full access – allows users to change the name and address, view and file returns, view and submit payments.
      ii. View and File access – allows the users to view and file returns, view and submit payments.
      iii. View only access – allows the user to view returns and payments that have been submitted.
   f. To **give** them access, click the Active check box and a check mark will appear.
   g. To **cancel** their access, click the Active check box and remove the check mark.



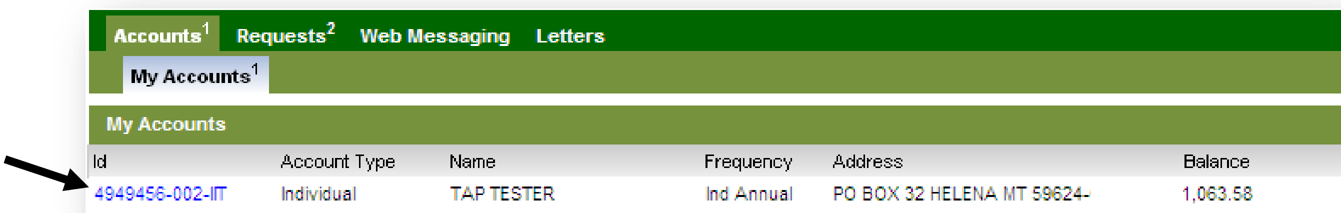
Navigation

6. How do I update email address, phone number, web name or secret question and answer? Back to Top
    a. Go into “View My Profile.” Choose the blue link or tab that corresponds with what you to want accomplish.

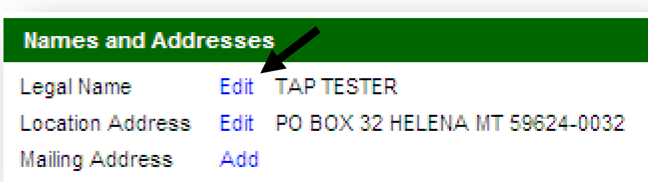




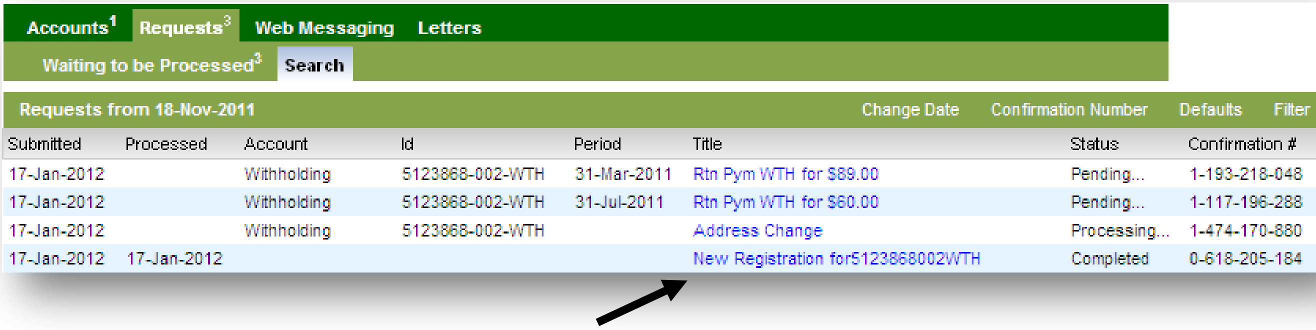
7. How do I get into my tax account? Back to Top
    a. Click on the blue ID number under My Accounts.



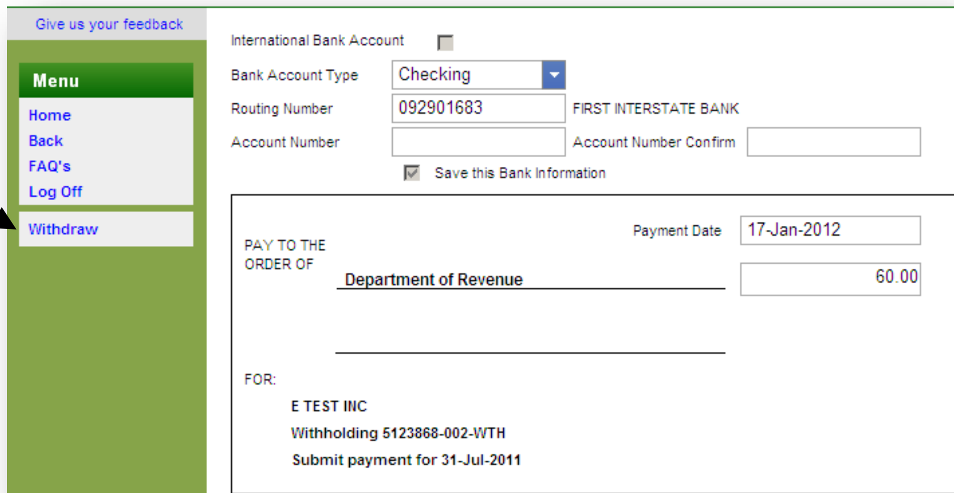
8. Can I add or edit my name and address with the Department of Revenue? Back to Top
    a. Yes. Once you go into your tax account on the top left of the account screen, choose Add or Edit next to the item you want to change.



9. How do I view or cancel requests such as returns or payments that I submitted on TAP? Back to Top
To view requests submitted in TAP, select the “Requests” tab.
From there, you can view the “Waiting to be Processed” and the processed request can be located under the “Search” tab.



a. To view a request, select the blue link of the transaction you want to view or cancel.
b. Select Withdraw to cancel the request.

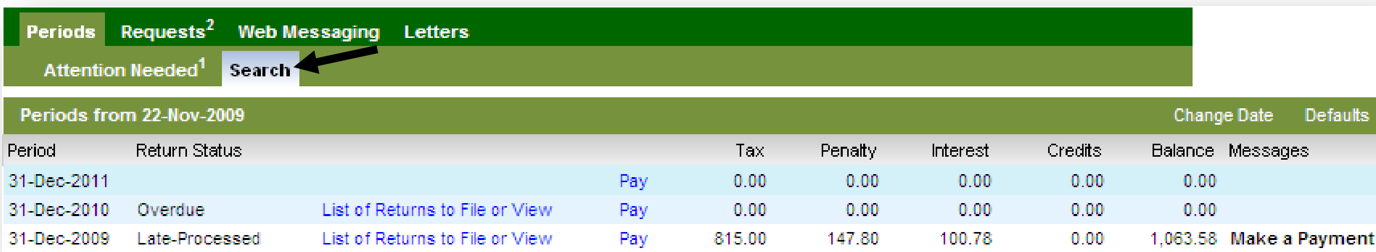


Returns

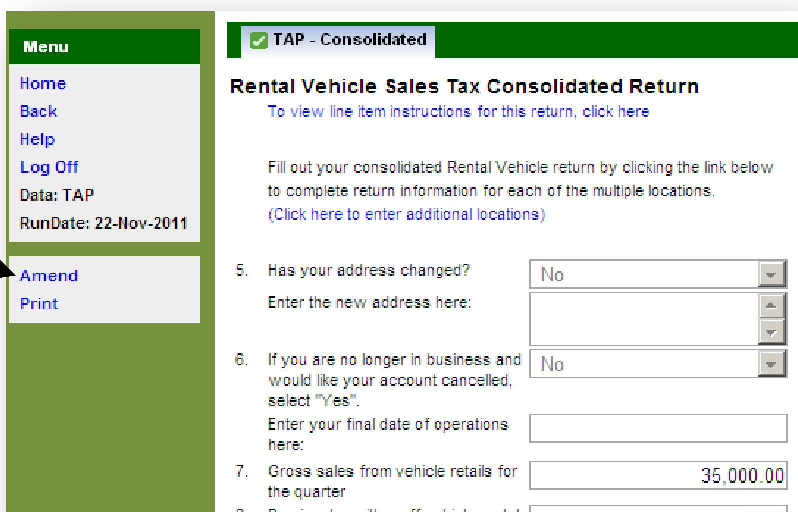
10. How do I file a return? Back to Top
    a. Under the Periods tab, select the File Now or List of Returns to File or View link next to the period you wish to file.

11. Where do I find previously filed returns? Back to Top
    a. Select the Search tab under Periods; then select the “List of Returns to File or View.” Some account types will state “View Return.”

12. What if the year I need to file is not listed? Back to Top
    a. Select the Search tab under Periods – this will give a list of all the periods you may view or file.
    b. If you still don’t see the Period you need, please **Contact Us**.



13. How do I amend a previously filed return? Back to Top
    a. Go into the View Return for the period you want to amend, and if this type of return can be electronically amended, select Amend on the left hand side of the screen. Make the necessary changes and then submit the return.



    b. The returns that can be amended on TAP are:

Beer Tax (BET)	Nursing Facility Utilization Fee (NFB)	Telephone Device for the Deaf (TDD)
Consumer Counsel Fee (CCT)	Other Tobacco Products (OTP)	Wholesale Energy Trans Tax (WET)
Hard Cider (HCT)	Public Service Regulation Fee (PSR)	Wine Tax (WIT)

Hospital Facility Utilization Fee (HUF)	Rental Vehicle Tax (RVT)	911 Emergency Telephone Fee (911)
Lodging Facility Sales & Use Tax (LFT/LST)	Retail Telecom Excise Tax (RTE)	

14. How do I print my return?

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   a. Before submitting your return, you can print and review the return by selecting the Save and Finish button to the left. Then, fill in your email address so that you can get a retrieval code. Once your confirmation message is displayed, you can select the Print button.
   b. After submitting your return, when you see a confirmation page, select the Print button to print a copy of your return for your records.
   c. When logging back in to a TAP account, you will see a list of returns to view or file. Select the return you wish to view; then click on the print option to the left.

Payments

15. How do I make a payment?

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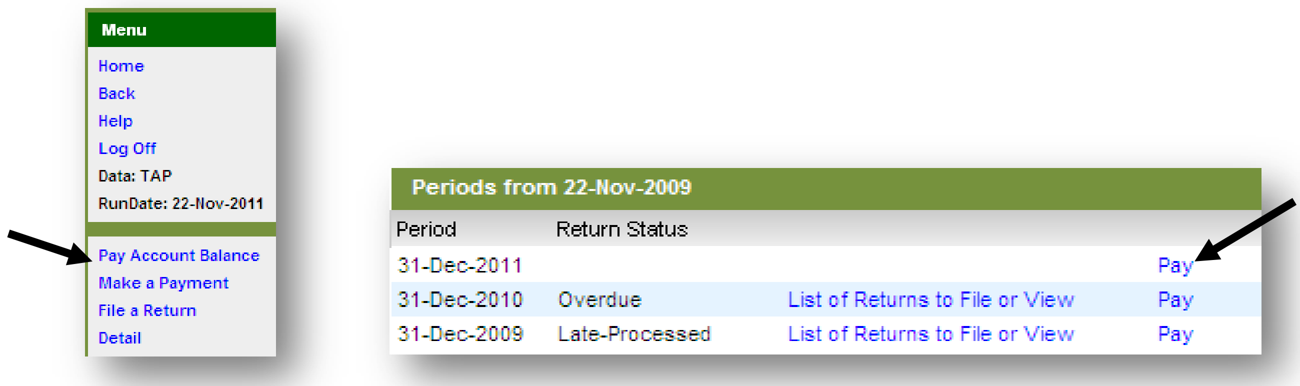
   a. Select one of the links “Make a Payment,”, “Pay Account Balance” or the “Pay” link next to the period.

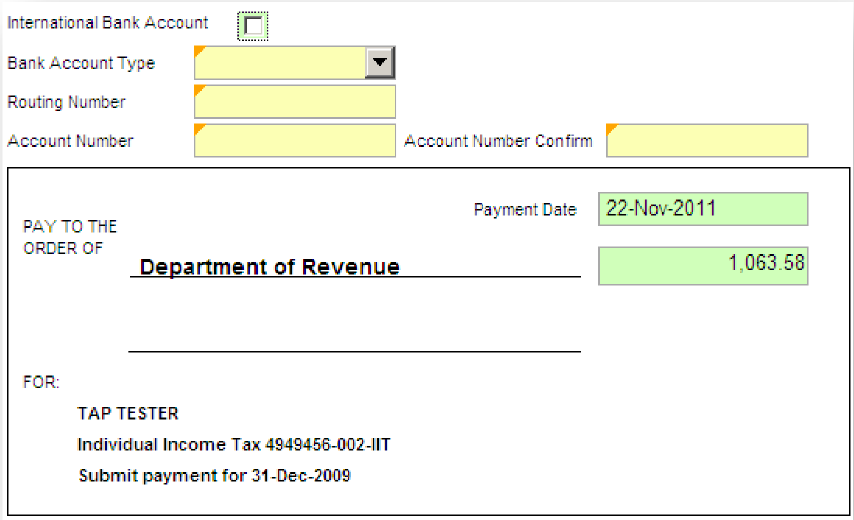


   b. If using the Make a Payment or Pay link, you will be prompted to choose the payment type: Return, Amended, Estimated, Extension, Renewal (whichever is applicable to your tax account).

   c. Select the payment source:

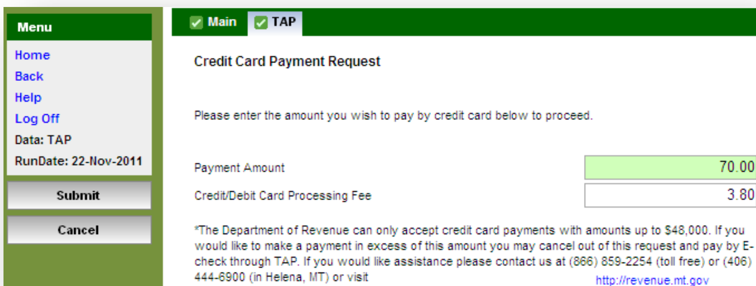
E-Check payment (free)

Enter the following information: bank account type, routing number, account number, the date you want the payment withdrawn from your bank account, and the amount you want to pay.



Card payment (small process fee)

a. Enter Payment Amount you want to pay & submit.



b. You will then be prompted to enter your name, address, telephone number and debit/credit card information.

16. Can I submit payments to process on a future date?

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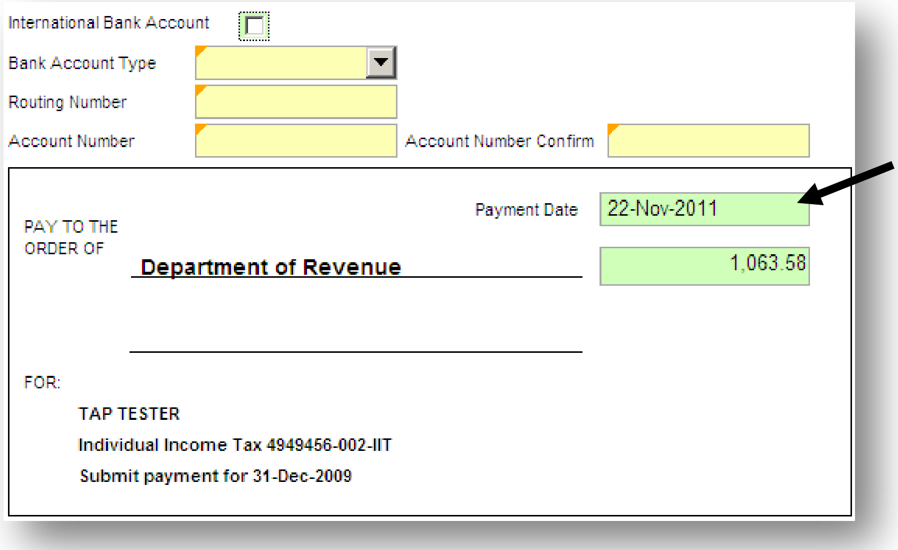
d. Yes, but this option is only available for e-checks. When you are in the payment screen, enter the date you want the payment to withdraw from your account.



Note: the payment will not reflect on your tax account balance until it is processed.

17. Can I store my banking information for future use?

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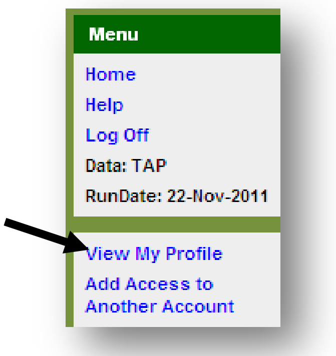
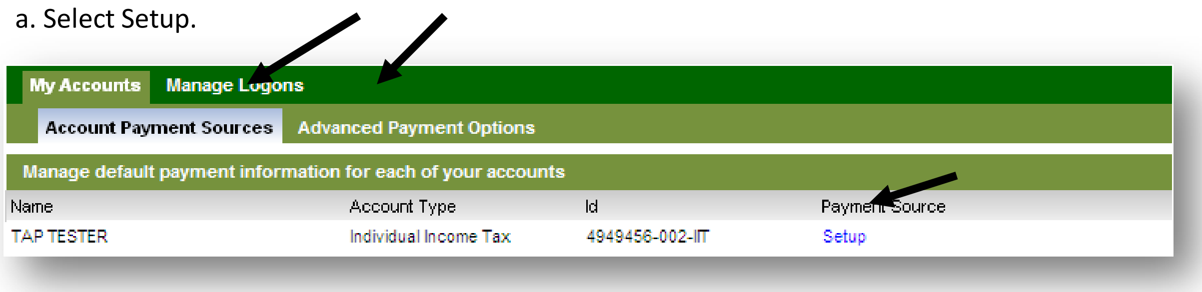
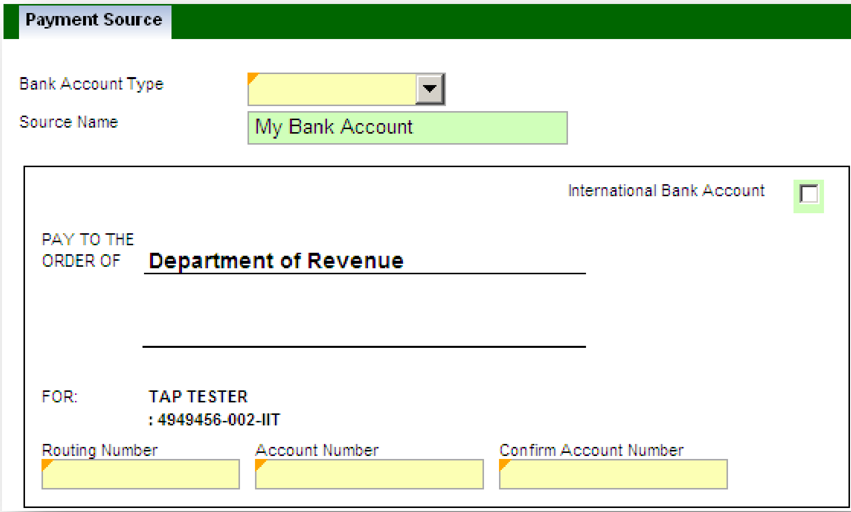


To add a payment source for all tax accounts listed under your login, use the “Account Payment Source” tab.
To add a payment source for a specific tax account under your login, use the “Advanced Payment Options” tab.

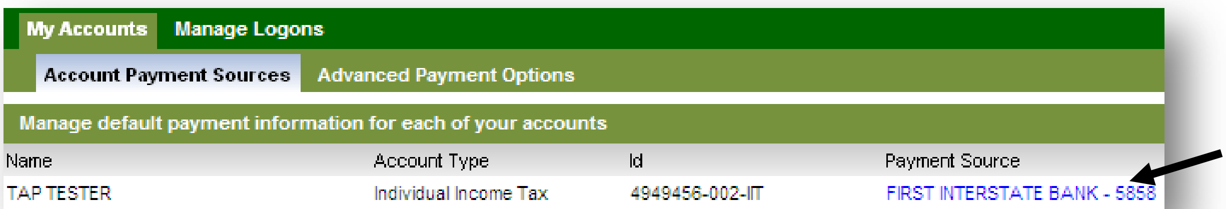
a. Select Setup.



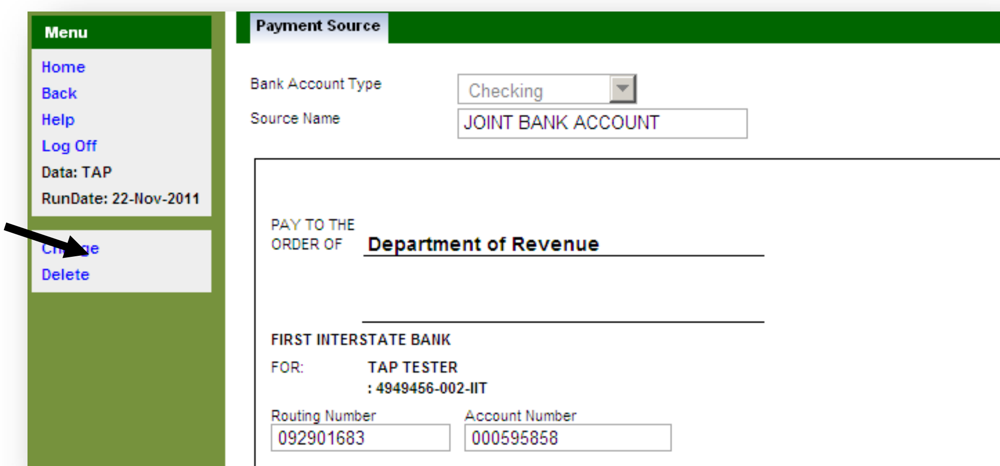
b. Enter banking information.



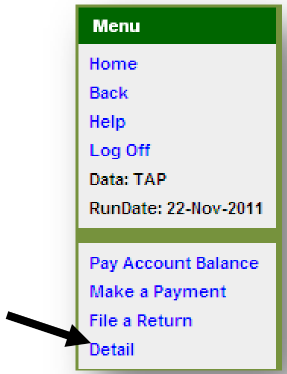
To edit existing banking information, select the blue link under Payment Source.



Select Change on the left hand side of the screen and edit the necessary information.



18. How do I view my payment history?
    e. Select Detail.



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Problem Solving/Technical Issues

19. What are the operating system and browser requirements?
    Operating system: There are no requirements. All systems should work as long as they can run a browser
    Browser requirements:
    Internet Explorer 7+
    Firefox 3+
    Opera 10+ (and possibly lower versions)
    Safari 5+ (and possibly lower versions)
    Chrome
    iOS 3+
    Android 2.1+

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20. I cannot print. What do I do?
    a. You will need Adobe Reader to view and print your copy. If you do not already have Adobe Reader installed on your computer, you may download the software for free.
    b. The browser pop-up blocker must be turned off in order to view and print your electronic return copy.
        i. To temporarily disable pop-up blockers, try holding the Ctrl key down while clicking on the link. If that doesn't work, follow the instructions that pertain to your browser:

    Internet Explorer: Menu Bar > Tools > Pop-Up Blocker > Turn Off Popup Blocker
    Fire Fox: Menu bar >Tools > Options. Choose the Content tab and uncheck "block pop-up windows" and select ok.
    Other internet browsers – use the help option.

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